

Ron Bienkowski  
Chris Eide  
George Ferguson  
James Ritchie  
Robert Tait  
Dan Wiedemann



## TOWN OF NEWTOWN

### SHARED SERVICES COMMITTEE

The Legislative Shared Services Ad Hoc Committee held a regular meeting on Tuesday, May 25, 2016 at 7:30pm, in Meeting Room One in the Newtown Municipal Center, 3 Primrose Street, Newtown, CT.

PRESENT: Ron Bienkowski, Chris Eide, George Ferguson, James Ritchie, Robert Tait, Dan Wiedemann.

ALSO PRESENT: MaryAnn Jacob, Pat Llodra, Dr. Erardi.

CALL TO ORDER: Mr. Wiedemann called the meeting to order with the Pledge of Allegiance at 7:30pm.

VOTER COMMENT: None

MINUTES: MR. FERGUSON MOTIONED TO APPROVE THE MINUTES OF THE REGULAR MEETING OF MAY 3, 2016. SECOND BY MR. EIDE. ALL IN FAVOR.

COMMUNICATIONS: None

REPORTS ON MEETINGS WITH DEPARTMENT HEADS: Mr. Wiedemann and Mr. Ritchie met with facilities and accounting. Mr. Ferguson and Mr. Eide met with IT, Security, and Human Resources.

(Reports attached)

Facilities: Mrs. Llodra asked what is the data that evidences there is a benefit to be gained by putting town building maintenance under one care model with the schools, what is the cost benefit analysis, what changes would need to take place, what is the timeline to implement, and what are the impacts.

Mrs. Llodra recommended having Gino Faiella and Fred Hurley conduct a comprehensive examination of the cost of maintenance of municipal buildings and to develop a model of care for the town buildings and when they can conclude the study.

Accounting: Recommended to gather more data on combining accounting office's/services and sharing space. Need a specific plan on how to accomplish. Mr. Tait and Mr. Beinkowski will create a step by step process.

Recommended to further study the benefits of a Purchasing Agent, provide more info on costs and data on why it is worthwhile.

Security: Mr. Eide noted security has already implemented shared services. The Police involvement with school functions is at the top level as a result of 12/14.

Human Resources: Recommended to further study a co-location, collaborating on training/service, implementing a shared HR system to digitalize records and collaborating in employee training and professional development.

Mrs. Llodra recommended good practices/successes/protocols be identified, reported and formalized so employees know and understand the work of colleague in a different department doing the same work. They can review the protocols/behaviors that are collaborative. What are best practices to use to encourage behaviors that individuals can self-check their understanding of where they are on the spectrum of cooperation.

Dr. Erardi suggested further exploring savings and efficiencies with Parks & Rec and High School sports/facilities.

VOTER COMMENT: None

ANNOUNCEMENTS: Next meeting will be June 16, at 7:30pm.

ADJOURNMENT: There being no further business, the meeting was adjourned at 9:20pm.

Respectfully Submitted,

Carey Schierloh, Clerk

Attachment: Summaries of Meetings with Department Heads

*These are draft minutes and as such are subject to correction by the Shared Services Committee at the next regular meeting. All corrections will be determined in minutes of the meeting at which they were corrected.*

## Meeting Summary

At a regular meeting of the Shared Services Committee held on Tuesday, May 3, 2016, it was agreed that the committee would meet with select Municipal and School Board employees. This document summarizes the discussions held with representatives responsible for Facilities, Accounting, Athletics and Park & Recreation. Two meetings each lasting approximately two and one half hours were held on Tuesday, May 17, 2016. The meetings were organized by Chairman Dan Wiedemann who, together with Vice Chairman Jim Ritchie, attended both meetings. Meetings took place in Conference Room 1 at 9:00 am and 1:30 pm. The questions used to guide discussion of shared services are attached to this summary.

### Accounting:

Robert Tait, Director of Finance and Ron Bienkowski, Director of Business represented the Municipality and Board of Education respectively.

After reviewing the general purpose of the meeting the discussion centered on Accounting and Purchasing operations. In the accounting area payroll and the accounting systems are currently the same. Similarly, BOE and Town share software, have combined liability and workers comp insurance, share budget formats and single CIP plan. However, accounts payable, payroll, reporting, accounting expertise and purchasing are areas where duplication occurs. Therefore, it was agreed that centralizing accounting responsibilities made a great deal of sense and that the Shared Services Committee should seriously consider including centralization of accounting in their recommendation to the Legislative Council.

With respect to Purchasing, there was agreement that provision of a purchasing agent for the town had much potential. It is thought that doing so might improve the bid processes, lead to reduced expenditures due to bulk purchasing and free department heads from total responsibility for the bid process thus releasing them for other responsibilities. It was recognized that there was a need for a benefit/cost analysis before moving ahead with centralized purchasing but the idea is worth considering.

### Facilities, Athletics, Park & Rec:

Amy Mangold, Parks and Recreation Director; Carl Samuelson, Parks Director; Fred Hurley, Public Works Director; and Tim Whelan, Fleet and Garage Manager represented the Town at this meeting. Gino Faiella, Director of the BOE School Facilities was unable to attend this meeting due to illness.

A wide range of operations was discussed at this meeting. Although there was much pride in the way that services were being shared, that sharing was primarily the result of individual employees and departments working together to best serve the Town. Examples of cooperation and sharing include: Paving and lining at Park and Bark Dog Park, P&R. BOE and Public Works regularly share resources and equipment. P&R shares a mowing contract, field upkeep and snow plowing with the BOE. It was noted that the Blum Shapiro report noted the presence of a culture of shared services in the Town. However, they posited that the lack of formality could result in diminishment of the shared services culture over time. Those present do not believe that this is very likely given the strong culture of sharing that has evolved over time. It is the belief of those present that shared services is a direct result of staff longevity and commitment. Still it was admitted that work needs to be done to smooth out problems as they occur. For example: P&R is currently experiencing difficulty accessing the grounds and facilities of the schools. It is believed that 12/14 and heightened security may be at the root of the problem and that change to Principals role responsibilities is also, from the perspective of P&R, problematic. There was also an occasion when the Courier Service was perceived to be less than cooperative. These are problems easily overcome and those present opine that the Town and BOE benefit mightily by the sharing that is currently taking place.

It was agreed that the Schools enjoy a high level of cleanliness and maintenance. It was also the belief of those present that the Municipal Center's maintenance and cleaning programs could be improved and that under the direction of the School Systems Director of School Facilities that improvement would take place. There was a concern that the maintenance on the Municipal Center was not up to the same standards as the schools which could lead to further expense in the future. With that in mind it was agreed that with proper planning, placing the Municipal Center under the BOE Director of Facilities makes sense and would lead to efficiencies and improved facilities maintenance. Other town facilities might also be brought under the roof of a single manager but a recommendation to do so is premature at this time. First there needs to be a consideration of the needs of each facility, the size of the facility and the function of each facility.

Dan Wiedemann, Chair, Shared Services Committee

Jim Ritchie, Vice Chair, Shared Services Committee

### **SHARED SERVICES - ACCOUNTING**

- Combine **accounts payable** functions.
  - Short term – physically place positions (2) together.
    - They still keep on doing what they are presently doing.
    - During this time period they can observe each other procedures and can exchange ideas on best practices.
    - There is room on either side of the corridor to place these (2) positions.
  - Medium term – review AP workload as a group and determine proper man hours for the AP function (any reductions will be as a result of turnover).
- Combine **payroll** functions.
  - Same short term/medium term as in AP (above)
  - There will be an education payroll specialist and a town payroll specialist reporting to their respective areas. However these positions should be able to interchange tasks over time (cross train).
- Combine **mail room** functions.
- Analyze **accounting procedures**.
  - Are we using the phoenix accounting system efficiently and effectively?
- Create a (central) **purchasing agent** position.
  - Must have an education purchasing background; capital project experience; and general purchasing skills.
  - This position would be required to attend the public building and site commission meetings.
- Finance department secretary position will be open 7/1/2016. This position will not be replaced. Finance secretary is a 25 hour per week position. Workload comprises answering department main phone line; processing department invoices; processing town mail (mail room function); ordering common department supplies; some purchasing functions (bid results etc.); among other things.
  - Workload will be distributed to accounts payable and payroll positions (upon consultation with union):
    - Accounts payable will take on the mail room function and department invoice processing.
    - Payroll will take the following workload from the accounts payable position (enabling A/P to take on the mail room function):
      - Entering journal vouchers
      - Entering deposit transmittals

- Finance department employees have their own direct phone lines.
- This should not affect any planned combining of accounts payable functions (between town & BOE).
- This will free up approximately \$25,000 (wages = \$23,205; social security = \$1,775).
  - These savings could be set aside to be used when a purchasing function is created.
  - This also takes a position of the town pension plan.

## HUMAN RESOURCES

Overall Recommendation:

In order to facilitate the implementation of shared services, we recommend that the Newtown Board of Education and Town of Newtown consider exploring further collaboration of the Human Resource departments including:

- Implementing a shared HR System for digitization of records and tracking of employees
- Collaborating in employee training and professional development in order to facilitate cross training and best practices among all HR employees
- Being co-located in order to facilitate collaboration among colleagues, assuming:
  - The BOE HR maintains easy contact with necessary departments (Benefits, Payroll, Superintendent, Assistant Superintendent, SPED Services)
  - HR departments maintain a private meeting area for sensitive conversations (union negotiations, employee meetings, etc.)

What is already being done:

- Pension questions, advice, research and processing new retirees
  - For shared pension, not those on TRB (teachers and administrators)
- Day-to-day questions
- Collaboration of Policy and Process
- Phoenix HR system
- Security officers were jointly interviewed with NPD
- Fingerprinting and background checks

What is in the works:

- Further implementation of the Phoenix HR system

What could be done in the future:

- HR Tracking System
  - Digitization of records/Personnel folders
  - Keeping track of time-sheets
  - Tracking of items relating to education (teaching assignments, tenure, etc)
- Cross Training
- Joint Training/Professional Development
- Co-Location assuming:
  - BOE has access to Superintendent, Assistant Superintendent, Benefits, Payroll, SPED Services
  - Access to confidential areas for sensitive conversations

Things recommended to avoid:

- Cosmetic Changes (changes made for the sake of change, without any conferred benefits)
- Consolidation without mindfulness to requirements of each side (BOE HR deals with 6 different unions/contracts in teachers, administrators, nurses, custodians, paraeducators, and educational support staff; requires knowledge of TRB, law pertaining to education, etc)

## TECHNOLOGY

Overall Recommendation:

In order to facilitate the implementation of shared services, we recommend that the Newtown Board of Education and Town of Newtown Information Technology departments:

- Formalize a collaborative hiring process that takes input from both departments
- Collaboratively research and implement shared cloud services

What is already being done:

- Common Platforms/Hardware
  - Voice Systems
  - Datto (Cloud Data Backup)
  - Phoenix Accounting
  - Email (Google Apps)
  - Virtual Machine environment
- Shared Training (made possible by common platforms)
- Shared Hardware
  - Hardware “boneyards” in TON/BOE that they commonly draw from each others’ when they need a component (Power Supply given as an example)
- Shared HelpDesk Coordinator
- Shared Copiers/Printers
- TrackIT being used
- School Messenger

What is in the works:

- Gain failsafe for networking by leveraging TON/BOE networks (PSDN/CEN networks, respectively)
  - Allowing each network to use the others’ hookup in case of failure
- Shared Storage
  - To allow for storage of data backup

What could be done in the future:

- Cooperative hiring process
  - Ensures continuity of shared services through screening employees
- Common Cloud Implementation

Things recommended to avoid:

- Consolidation of web services
  - Currently, TON uses Virtual Town Hall (\$5,500 per annum), BOE uses SchoolDesk (~\$6,000 per annum). Consolidating would remove **support** from users (any teacher making a SchoolDesk website can call SchoolDesk support for assistance).
- Consolidation of “departments” under one umbrella
  - Complicates the budgeting process, since there are times where the BOE can take advantage of pricing not available to the Town
  - Shouldn't combine departments for the sake of “combining departments”

## SECURITY

Overall Recommendation:

In order to facilitate the implementation of shared services, we recommend that the Newtown Board of Education Security Department and Newtown Police departments:

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What is already being done:

- Sharing of Personnel and Supervision Thereof
- Sharing of Equipment Costs
  - Radios
  - Weapons Equipment
- Shared Risk Assessment for NPS
- Shared Training
- Familiarity of Facilities and Access to Security by NPD Officers
- Significant NBOE participation on the NPD's Juvenile Review Board (JRB)
- Constant Collaboration and Communication between Departments

What is in the works:

- Preparing for opening of New Sandy Hook School.
- Ongoing assessment of security needs looking to the future

What could be done in the future:

- Shared Purchasing of:
  - Two-Way Radio Batteries
  - Proximity Cards for Door Access

Things recommended to avoid:

Divulging specific security information such as locations or hours of operation of security personnel.